Connect user manual

A step by step guide to creating your first campaign

PRUPROTECT

Contents

① Register, set up and send a campaign

② Reporting – campaign statistics and analysis

③ Contact us and help

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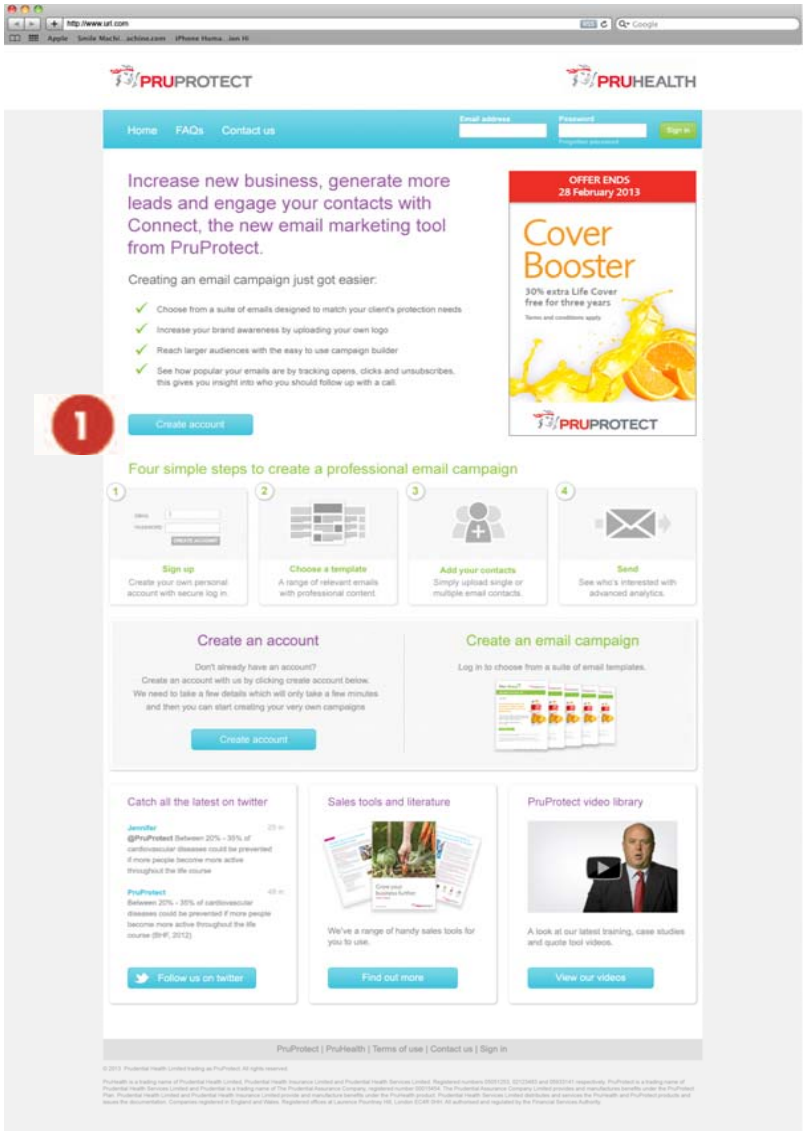
Connect: process flow


PRUPROTECT
PRUHEALTH
Home
FAQs
Contact us
Increase new business, generate more leads and engage your contacts with Connect, the new email marketing tool from PruProtect.
Creating an email campaign just got easier:
Choose from a suite of emails designed to match your client's protection needs
Increase your brand awareness by uploading your own logo
Reach larger audiences with the easy to use campaign builder
See how popular your emails are by tracking opens, clicks and unsubscribes, this gives you insight into who you should follow up with a call.
OFFER ENDS
28 February 2013
Cover Booster
30% extra Life Cover free for three years
PRUPROTECT
1
Create account
Four simple steps to create a professional email campaign
Sign up
Choose a template
Add your contacts
Send
Create an account
Create an email campaign
Create account
Catch all the latest on twitter
Sales tools and literature
PruProtect video library
Follow us on twitter
Find out more
View our videos
PruProtect | PruHealth | Terms of use | Contact us | Sign in

Home page

www.pruprotectconnect.co.uk

1. Create an account

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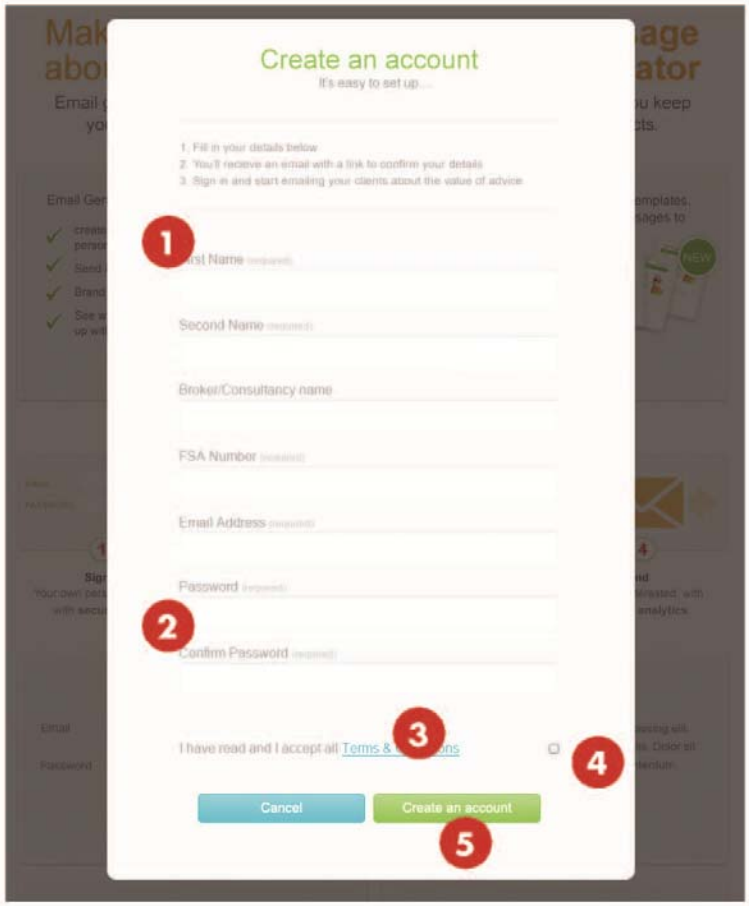
Connect: process flow



Create an account

1. Enter details
2. Create a password
3. Read and accept T&C's
4. Select create account

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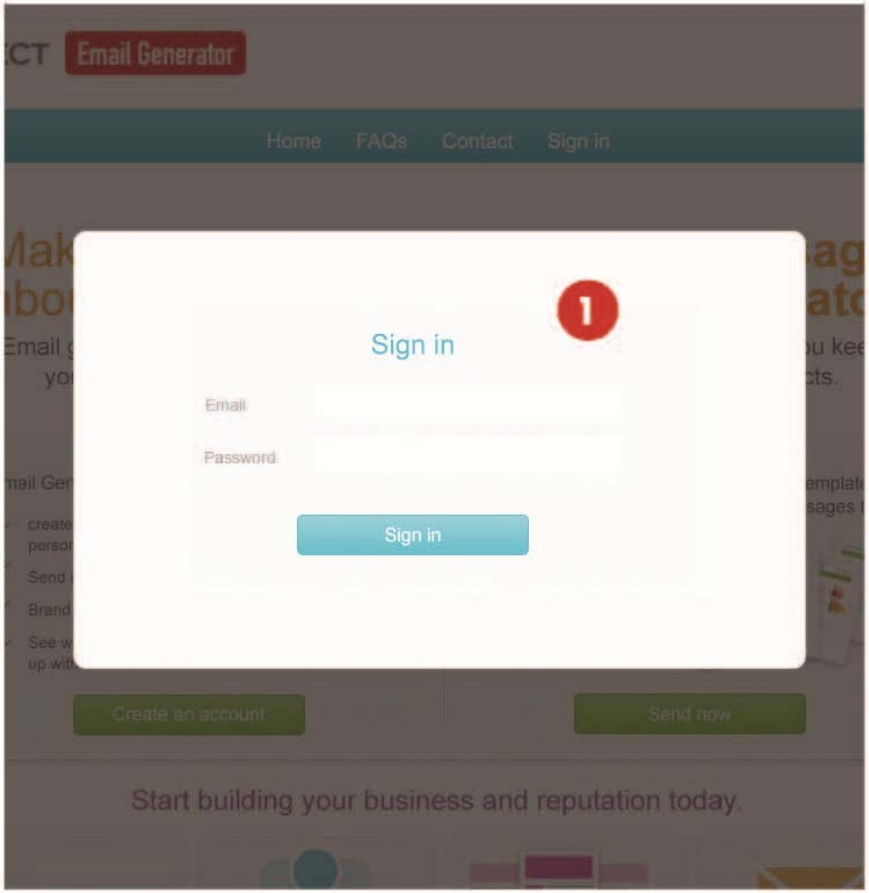
Connect: process flow



Sign in

1. The sign in box will appear immediately after an account has been created – click “Sign in”

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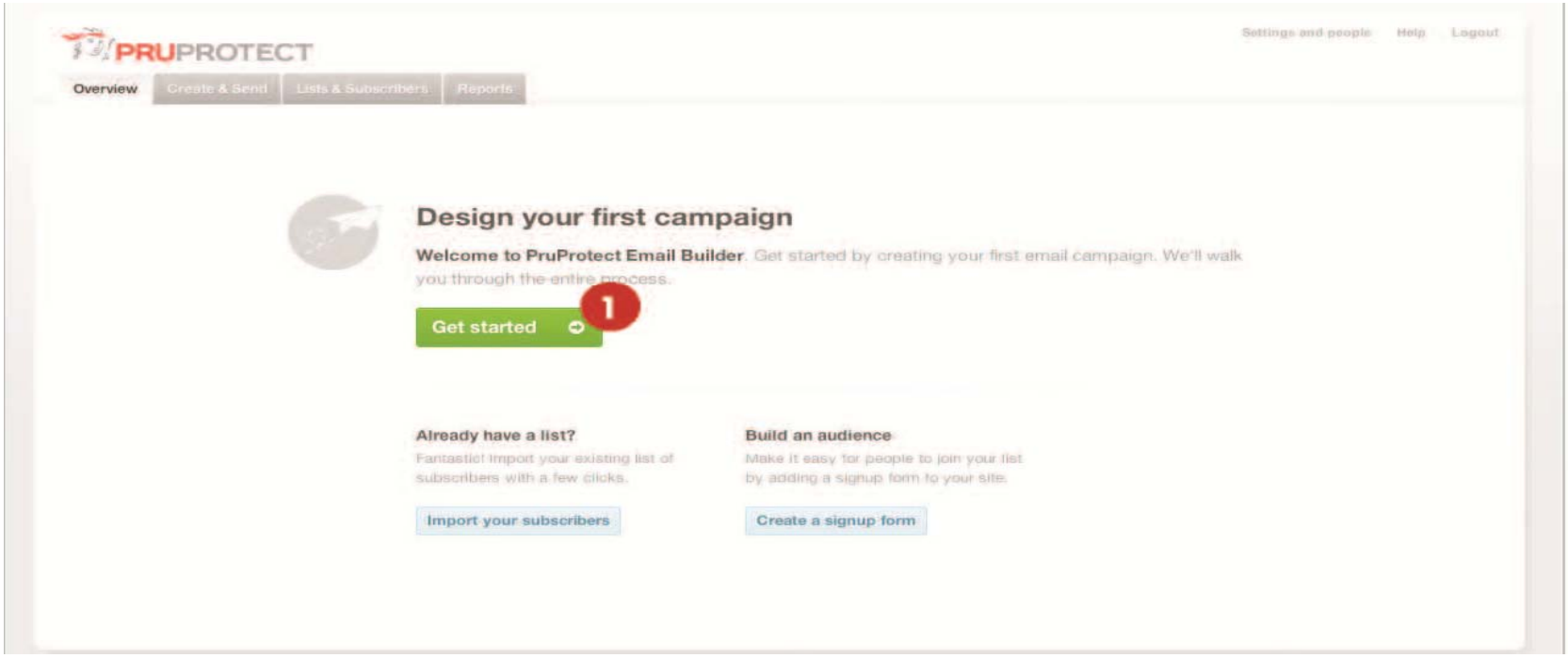
Connect: process flow

Dashboard

1. You can create a campaign immediately after signing up


PRUPROTECT
Settings and people
Help
Logout
Overview
Create & Send
Lists & Subscribers
Reports
Design your first campaign
Welcome to PruProtect Email Builder. Get started by creating your first email campaign. We'll walk you through the entire process.
Get started
1
Already have a list?
Fantastic! Import your existing list of subscribers with a few clicks.
Import your subscribers
Build an audience
Make it easy for people to join your list by adding a signup form to your site.
Create a signup form

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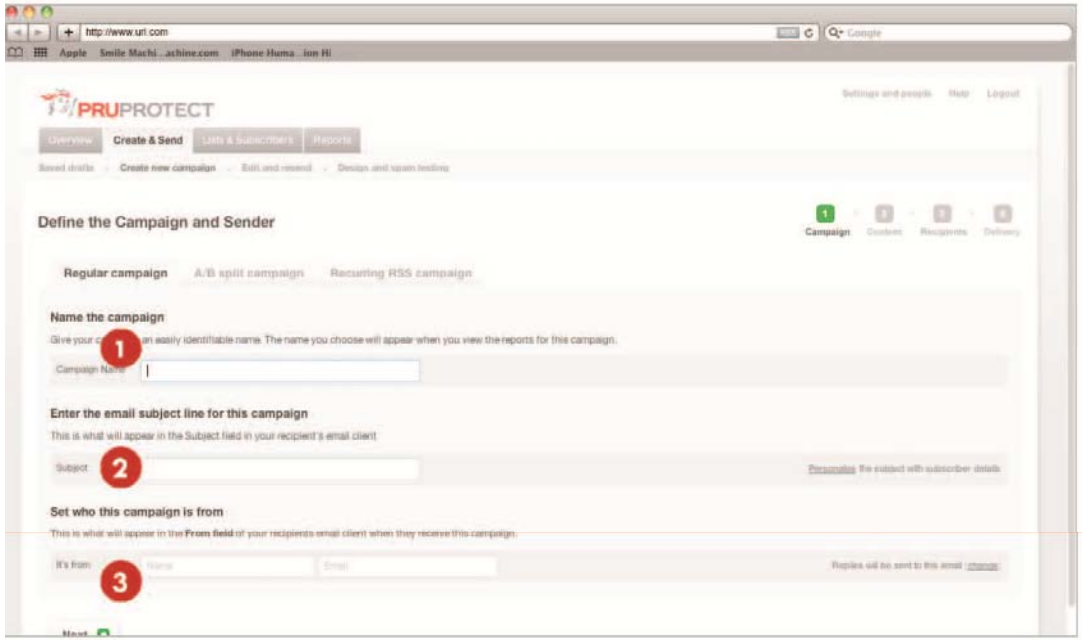
Connect: process flow



Define the campaign and sender

You can view all available templates in our literature and tools here under Connect email templates

1. Campaign name
2. Subject line
3. Email address of IFA

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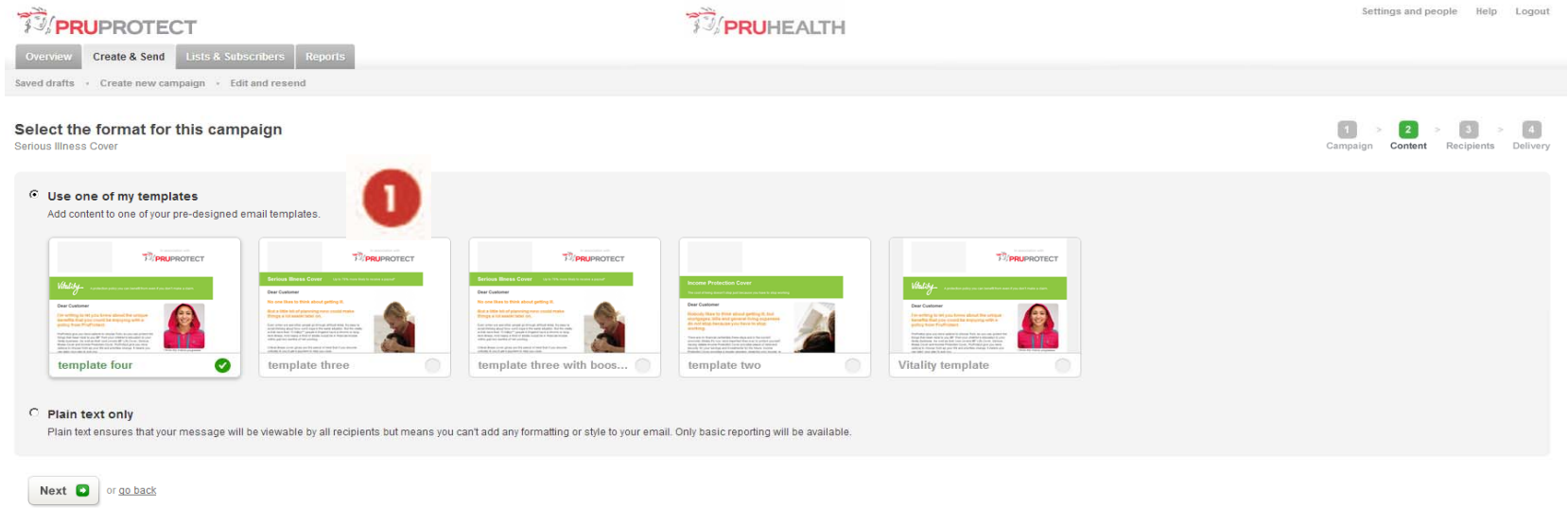
Connect: process flow

Choose a template

1. Select one of the pre-designed email templates



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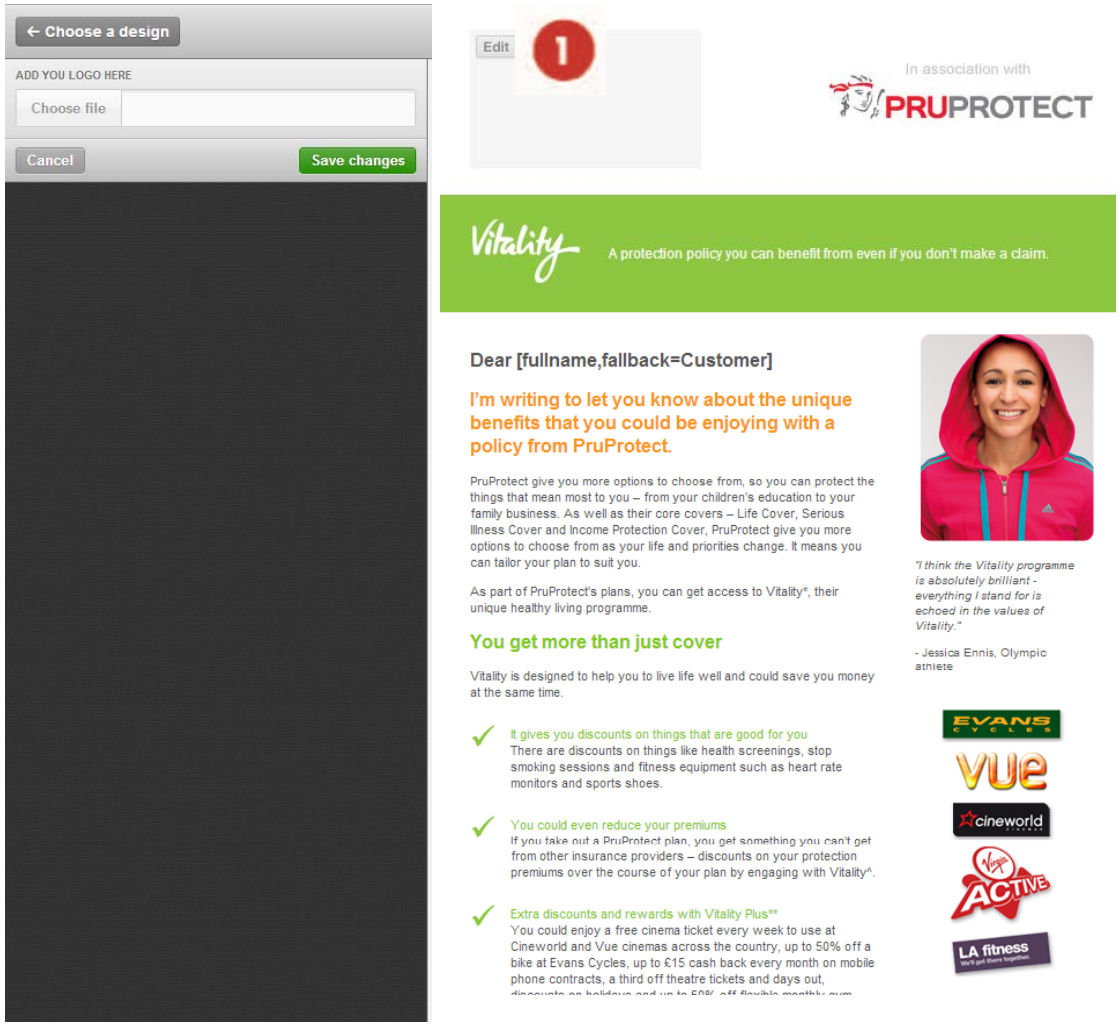
Connect: process flow


← Choose a design
ADD YOU LOGO HERE
Choose file
Cancel
Save changes
Edit
1
In association with
PRUPROTECT
Vitality
A protection policy you can benefit from even if you don't make a claim.
Dear [fullname,fallback=Customer]
I'm writing to let you know about the unique benefits that you could be enjoying with a policy from PruProtect.
PruProtect give you more options to choose from, so you can protect the things that mean most to you – from your children's education to your family business. As well as their core covers – Life Cover, Serious Illness Cover and Income Protection Cover, PruProtect give you more options to choose from as your life and priorities change. It means you can tailor your plan to suit you.
As part of PruProtect's plans, you can get access to Vitality*, their unique healthy living programme.
You get more than just cover
Vitality is designed to help you to live life well and could save you money at the same time.
It gives you discounts on things that are good for you
There are discounts on things like health screenings, stop smoking sessions and fitness equipment such as heart rate monitors and sports shoes.
You could even reduce your premiums
If you take out a PruProtect plan, you get something you can't get from other insurance providers – discounts on your protection premiums over the course of your plan by engaging with Vitality^.
Extra discounts and rewards with Vitality Plus**
You could enjoy a free cinema ticket every week to use at Cineworld and Vue cinemas across the country, up to 50% off a bike at Evans Cycles, up to £15 cash back every month on mobile phone contracts, a third off theatre tickets and days out,
"I think the Vitality programme is absolutely brilliant - everything I stand for is echoed in the values of Vitality."
- Jessica Ennis, Olympic athlete
EVANS CYCLES
VUE
cineworld
Virgin ACTIVE
LA fitness

Personalise with your logo

1. Click "Edit"
2. Select file to be uploaded and save changes

N.B

The recipient will be defaulted to Dear Customer if no names are added with the email addresses

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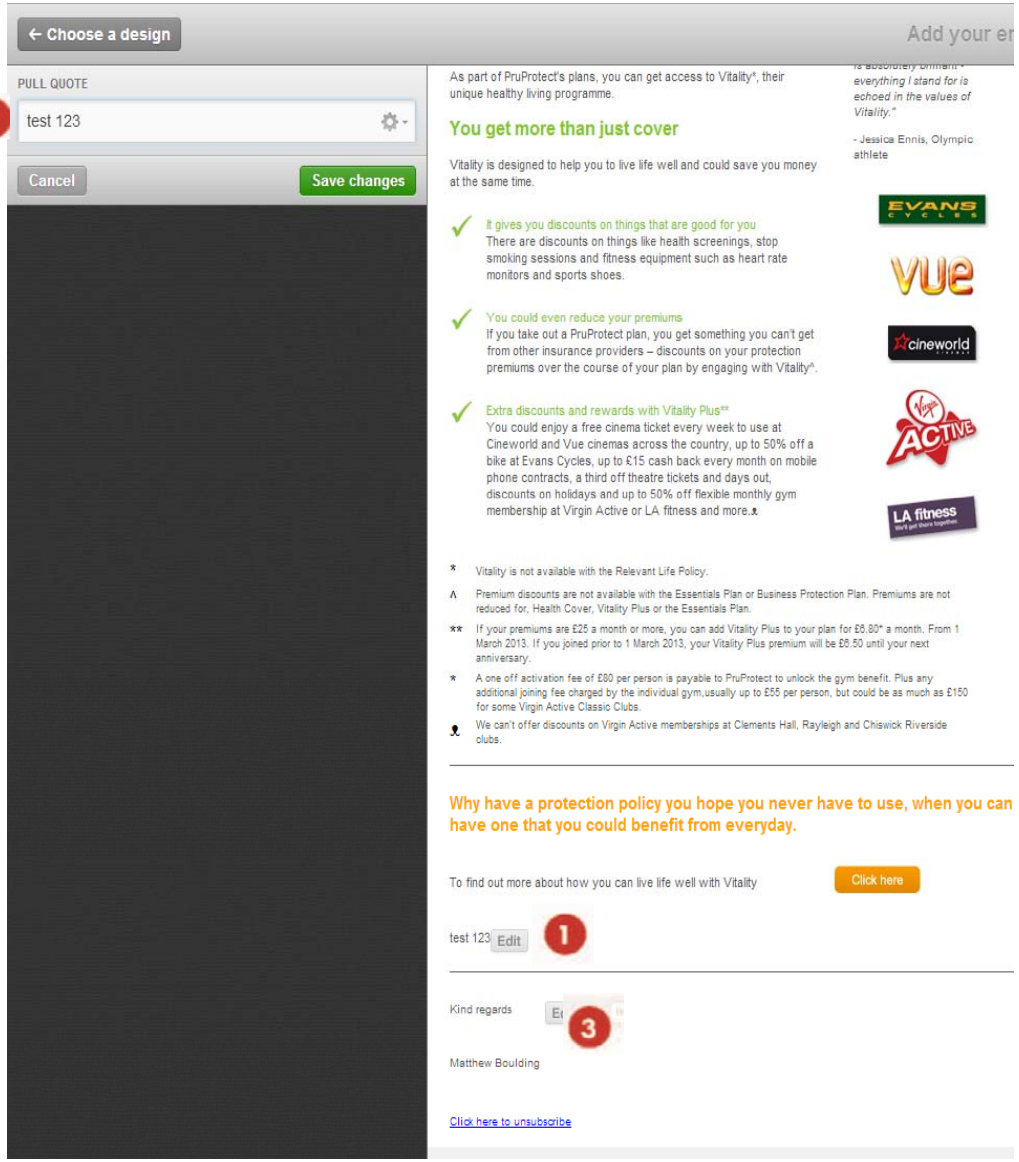
Connect: process flow


← Choose a design
Add your er
PULL QUOTE
2
test 123
Cancel
Save changes
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- Jessica Ennis, Olympic athlete
EVANS CYCLES
VUE
cineworld
Virgin ACTIVE
LA fitness
* Vitality is not available with the Relevant Life Policy.
^ Premium discounts are not available with the Essentials Plan or Business Protection Plan. Premiums are not reduced for, Health Cover, Vitality Plus or the Essentials Plan.
** If your premiums are £25 a month or more, you can add Vitality Plus to your plan for £6.80* a month. From 1 March 2013. If you joined prior to 1 March 2013, your Vitality Plus premium will be £6.50 until your next anniversary.
* A one off activation fee of £80 per person is payable to PruProtect to unlock the gym benefit. Plus any additional joining fee charged by the individual gym,usually up to £55 per person, but could be as much as £150 for some Virgin Active Classic Clubs.
ᵡ We can't offer discounts on Virgin Active memberships at Clements Hall, Rayleigh and Chiswick Riverside clubs.
Why have a protection policy you hope you never have to use, when you can have one that you could benefit from everyday.
To find out more about how you can live life well with Vitality
Click here
test 123 Edit
1
Kind regards
3
Matthew Boulding
Click here to unsubscribe

Add call to action (sign off/closing)

1. Click “Edit” (and for 3)
2. Add call to action (e.g. if you would like to know more please contact me on 07*********)
3. Closing (e.g. kind regards) and company footer details (information such as FSA number and legal information)

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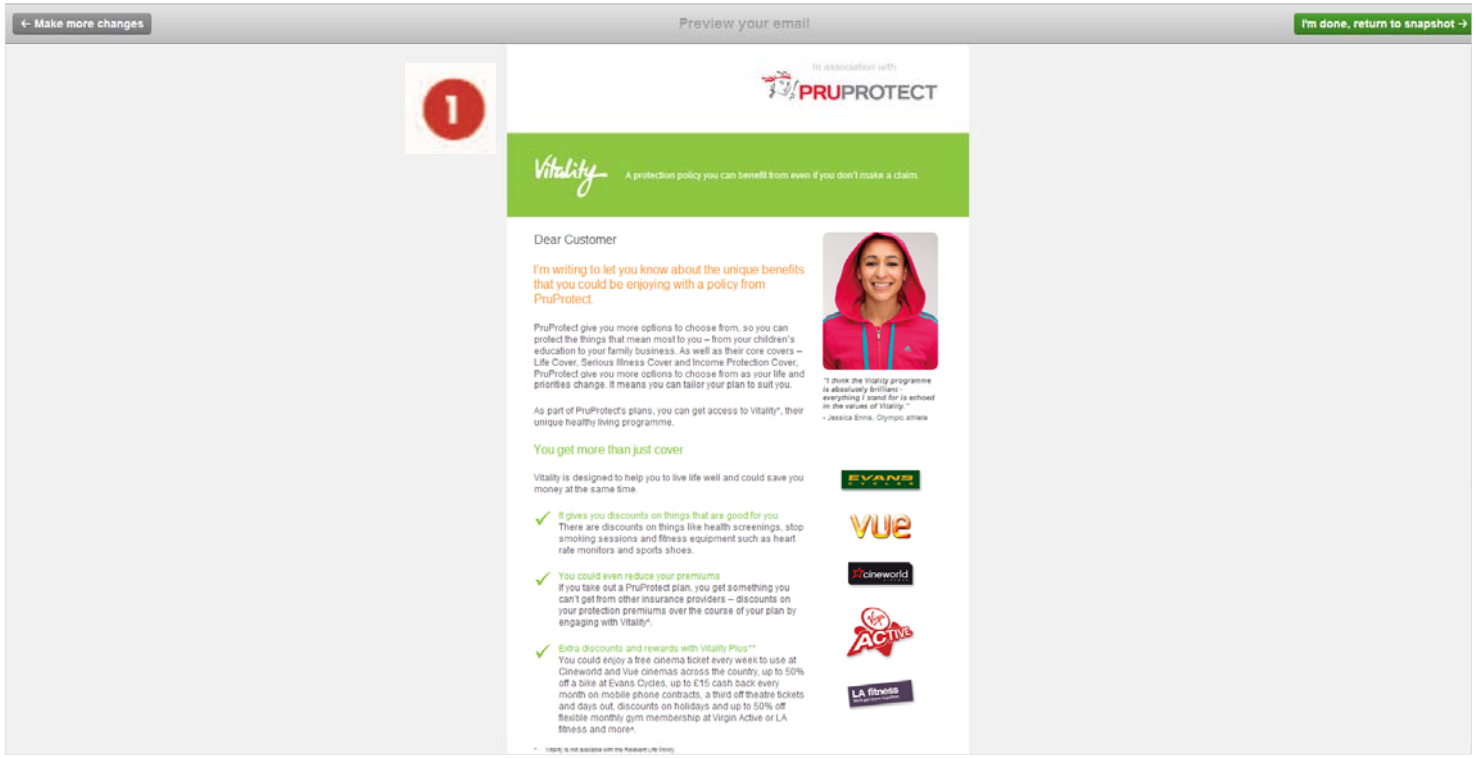
Connect: process flow

Preview email

1. Preview to see how your email will look


← Make more changes
Preview your email
I'm done, return to snapshot →
1
In association with
PRUPROTECT
Vitality
A protection policy you can benefit from even if you don't make a claim.
Dear Customer
I'm writing to let you know about the unique benefits that you could be enjoying with a policy from PruProtect.
PruProtect give you more options to choose from, so you can protect the things that mean most to you – from your children's education to your family business. As well as their core covers – Life Cover, Serious Illness Cover and Income Protection Cover, PruProtect give you more options to choose from as your life and priorities change. It means you can tailor your plan to suit you.
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"I think the Vitality programme is absolutely brilliant - everything I stand for is echoed in the values of Vitality."
- Jessica Ennis, Olympic athlete
EVANS
vue
cineworld
Virgin ACTIVE
LA fitness

PRUPROTECT

Connect: process flow

Define recipients

1. Add email addresses

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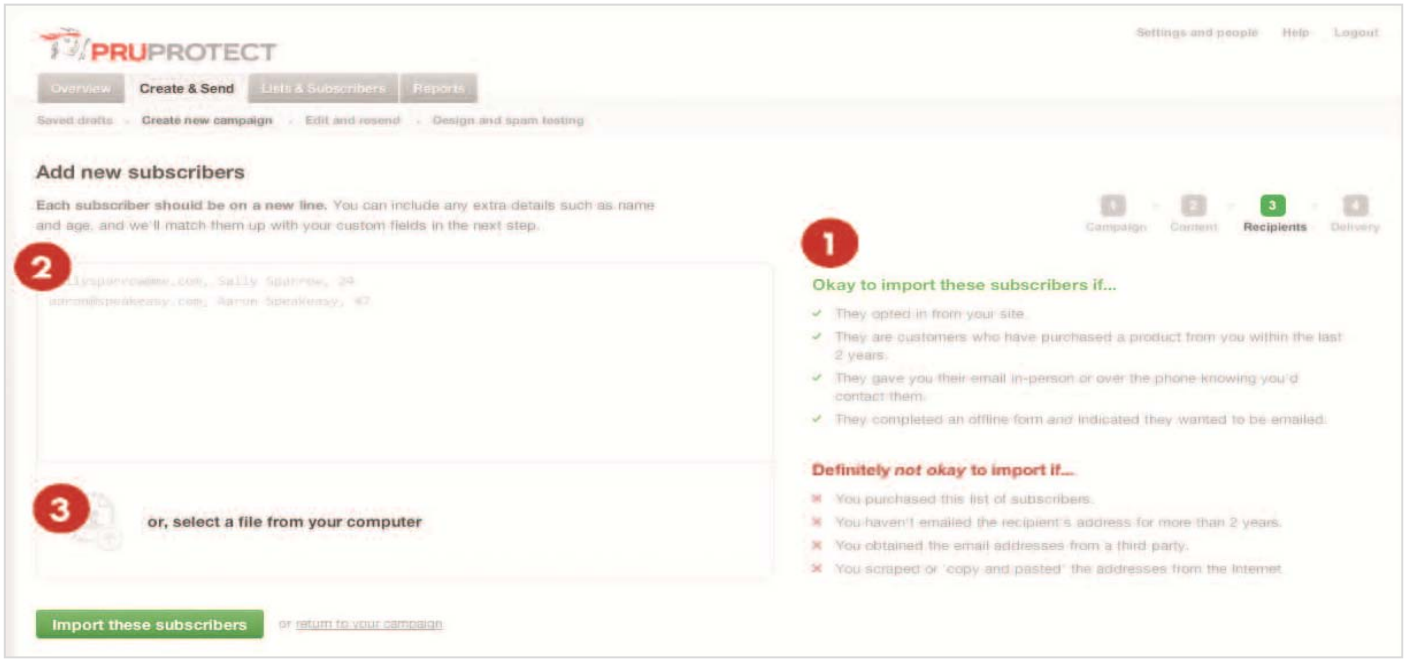
Connect: process flow

Add client/prospect list

1. Connect guidance on importing email addresses
2. Input email addresses manually or
3. Import a list of addresses (excel or CSV file)


PRUPROTECT
Settings and people
Help
Logout
Overview
Create & Send
Lists & Subscribers
Reports
Saved drafts
Create new campaign
Edit and resend
Design and spam testing
Add new subscribers
Each subscriber should be on a new line. You can include any extra details such as name and age, and we'll match them up with your custom fields in the next step.
Campaign
Content
Recipients
Delivery
1
2
3
Okay to import these subscribers if...
They opted in from your site.
They are customers who have purchased a product from you within the last 2 years.
They gave you their email in-person or over the phone knowing you'd contact them.
They completed an offline form and indicated they wanted to be emailed.
Definitely not okay to import if...
You purchased this list of subscribers.
You haven't emailed the recipient's address for more than 2 years.
You obtained the email addresses from a third party.
You scraped or 'copy and pasted' the addresses from the Internet.
or, select a file from your computer
Import these subscribers
or return to your campaign

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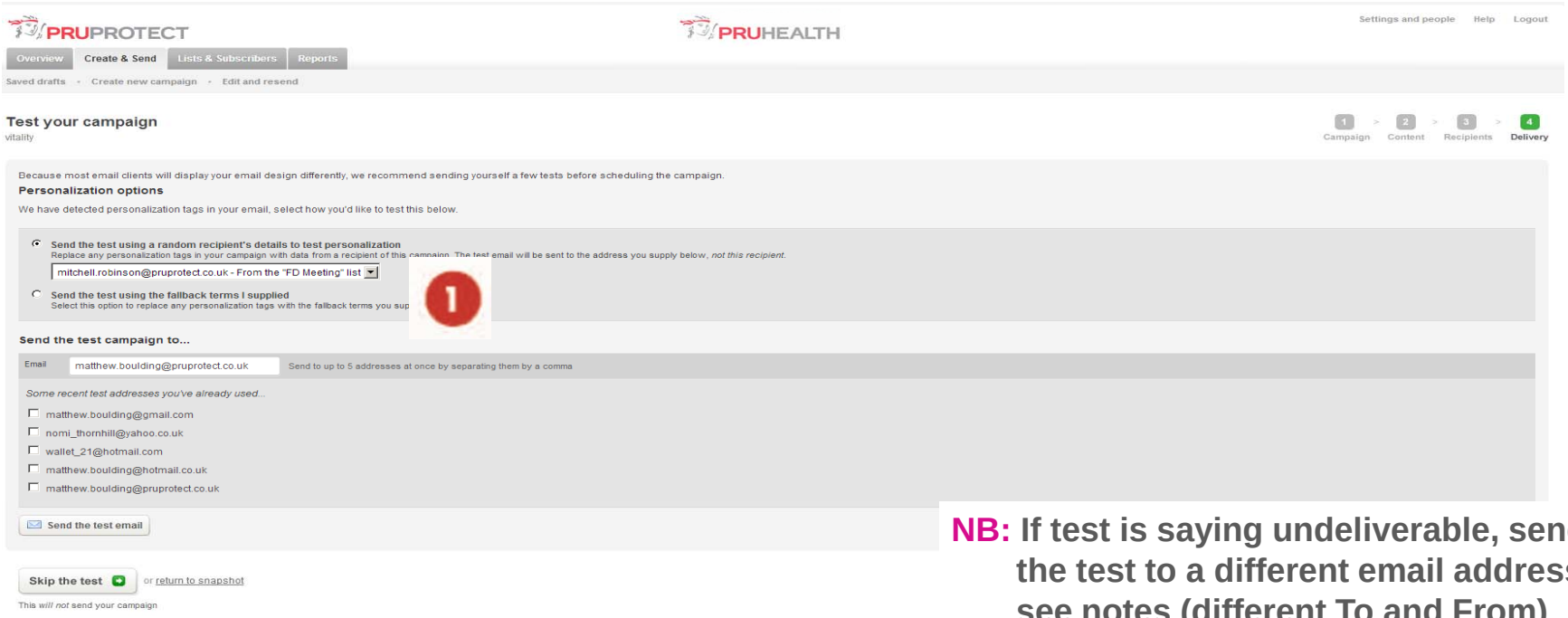
Connect: process flow

Test your campaign

1. Add a test email address to preview the email – this will send you an email of what your attended recipient will receive

   (**NB this will not send the campaign just a test email to your selected email address)**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PRUHEALTH
Settings and people
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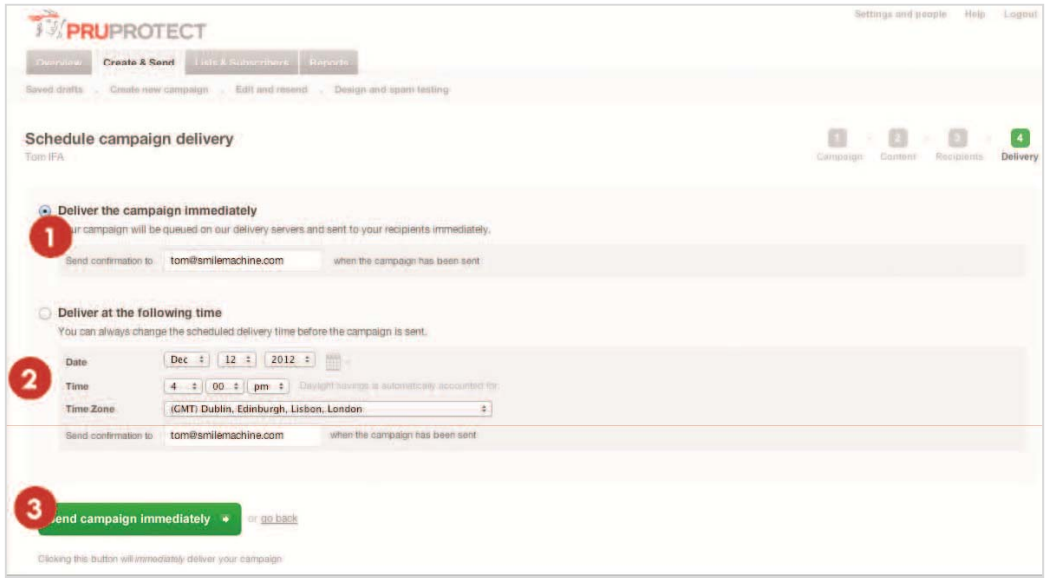
Overview
Create & Send
Lists & Subscribers
Reports
Saved drafts
Create new campaign
Edit and resend
Test your campaign
vitality
1 Campaign
2 Content
3 Recipients
4 Delivery
Because most email clients will display your email design differently, we recommend sending yourself a few tests before scheduling the campaign.
Personalization options
We have detected personalization tags in your email, select how you'd like to test this below.
Send the test using a random recipient's details to test personalization
Replace any personalization tags in your campaign with data from a recipient of this campaign. The test email will be sent to the address you supply below, not this recipient.
mitchell.robinson@pruprotect.co.uk - From the "FD Meeting" list
Send the test using the fallback terms I supplied
Select this option to replace any personalization tags with the fallback terms you sup
1
Send the test campaign to...
Email
matthew.boulding@pruprotect.co.uk
Send to up to 5 addresses at once by separating them by a comma
Some recent test addresses you've already used...
matthew.boulding@gmail.com
nomi_thornhill@yahoo.co.uk
wallet_21@hotmail.com
matthew.boulding@hotmail.co.uk
matthew.boulding@pruprotect.co.uk
Send the test email
Skip the test
or return to snapshot
This will not send your campaign

NB: If test is saying undeliverable, send the test to a different email address see notes (different To and From)

Connect: process flow

Send campaign

1. Deliver campaign immediately – just add the email address you would like confirmation of delivery sending to
2. Schedule delivery – select specific time and date and add confirmation email address
3. Click “Send now” or “Schedule delivery” (depending on above selection)

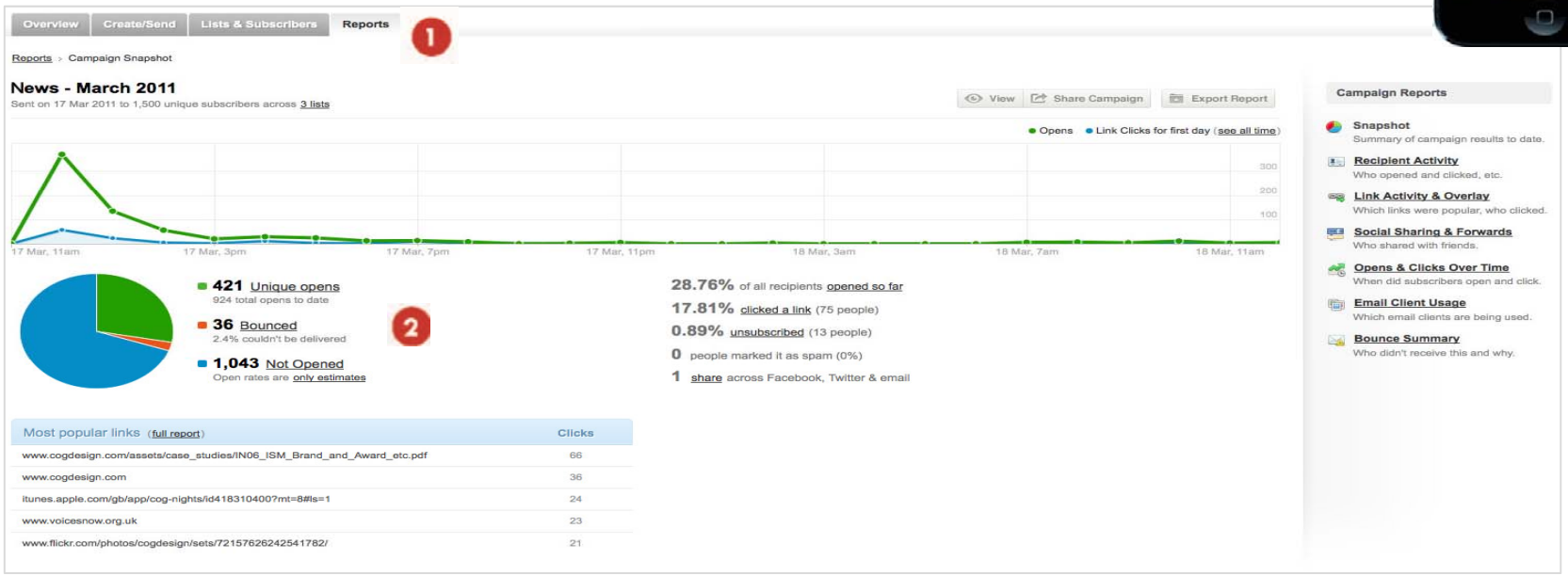


PRUPROTECT

Connect: process flow

Reporting - immediately after campaign has been sent

1. Campaign report
2. View live stats
3. View on iPhone by opening link on “Mobile”



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Reporting

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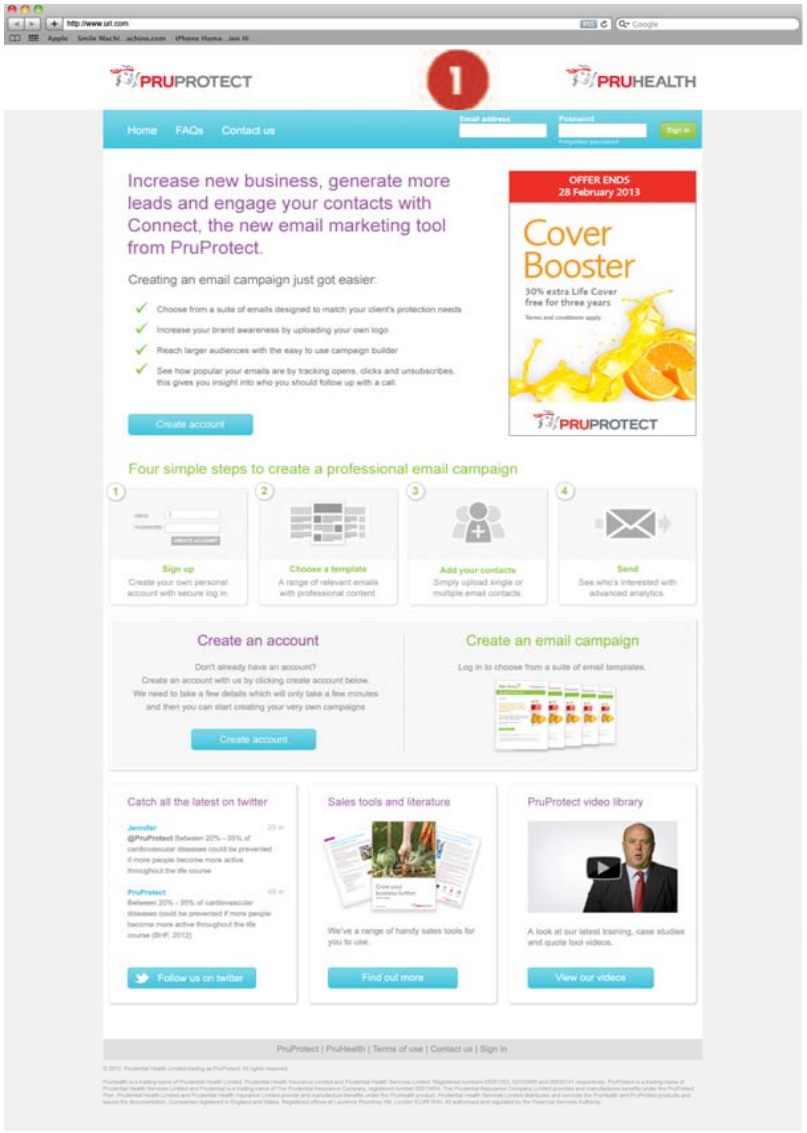
Connect: reporting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Add your contacts
Send
Create an account
Create an email campaign
Create account
Catch all the latest on twitter
Sales tools and literature
PruProtect video library
Follow us on twitter
Find out more
View our videos
PruProtect | PruHealth | Terms of use | Contact us | Sign in

PruProtect Connect

Home page

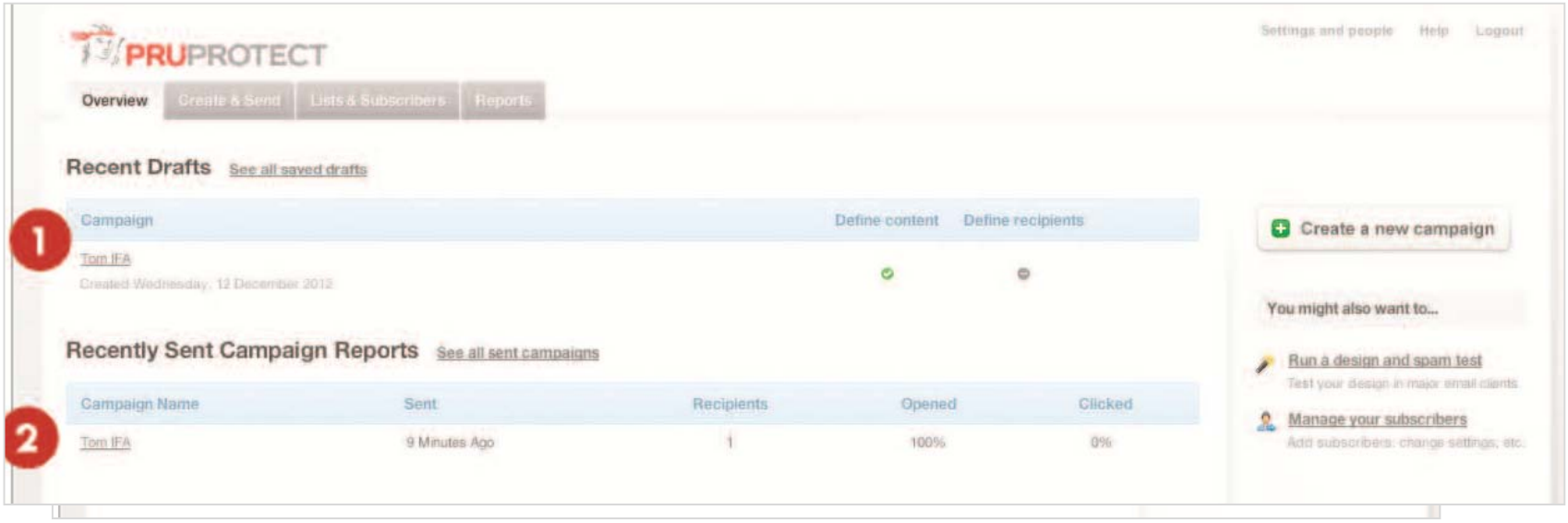
1. Sign in to Connect

PRUPROTECT

Connect: reporting

Connect dashboard

1. Campaign drafts
2. Sent campaigns (click to view report)



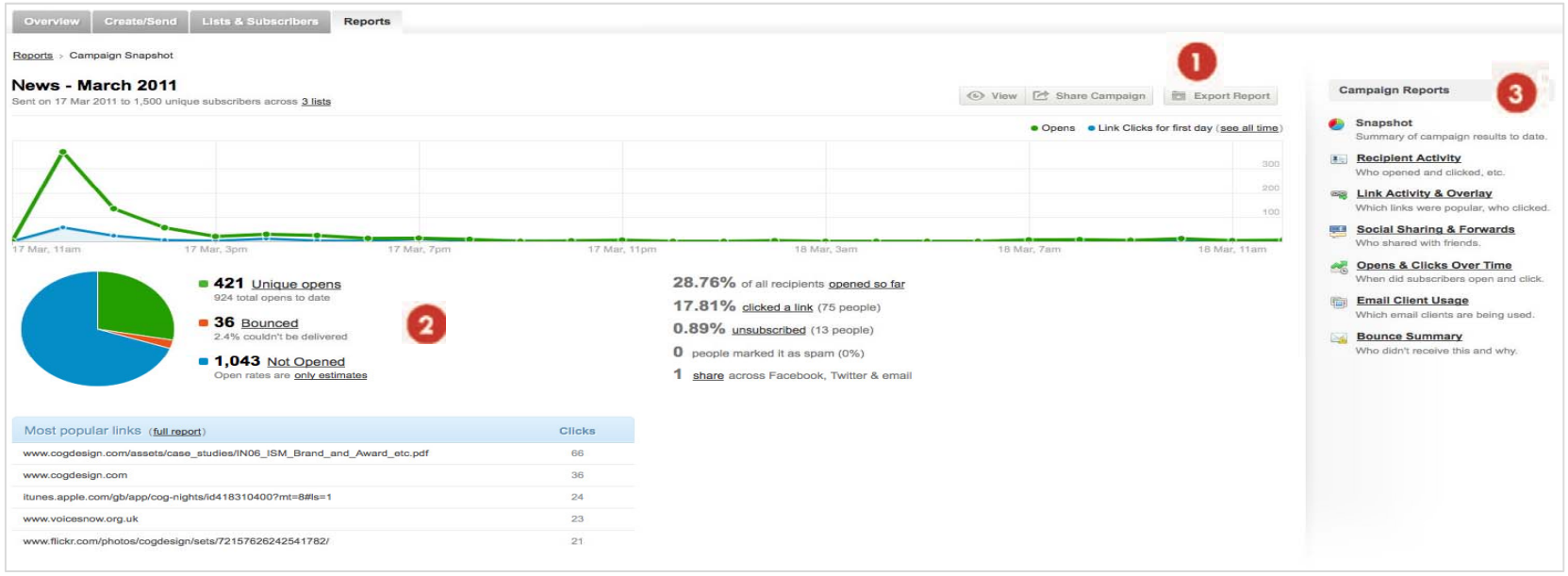
PRUPROTECT

Connect: reporting

Campaign report

A snap shot of the latest campaign results, here you can:

1. Export report to Excel
2. View campaign statistics
3. Review various campaign reports (more details)



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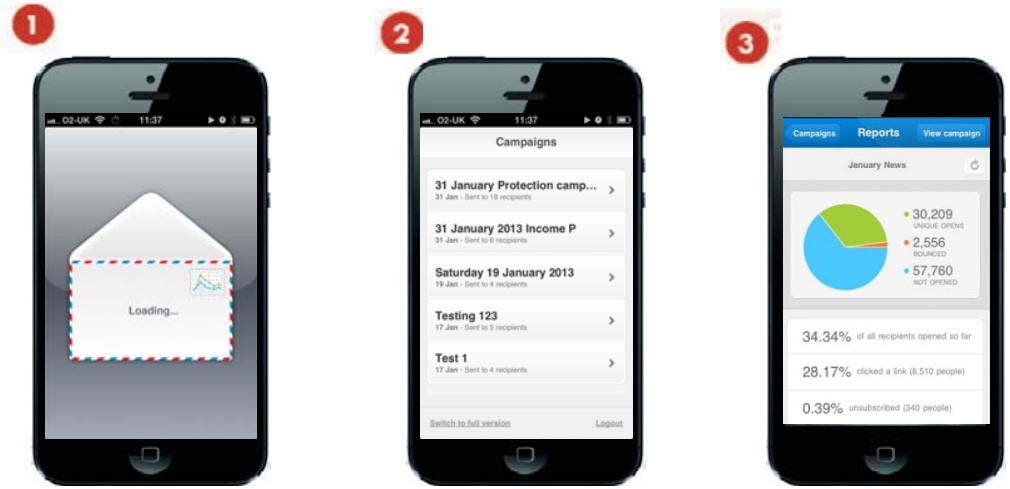
Connect: reporting

Mobile campaign report: iPhone

1. Click on confirmation email in inbox (loading screen appears)
2. Select “Campaign”
3. See live campaign overview

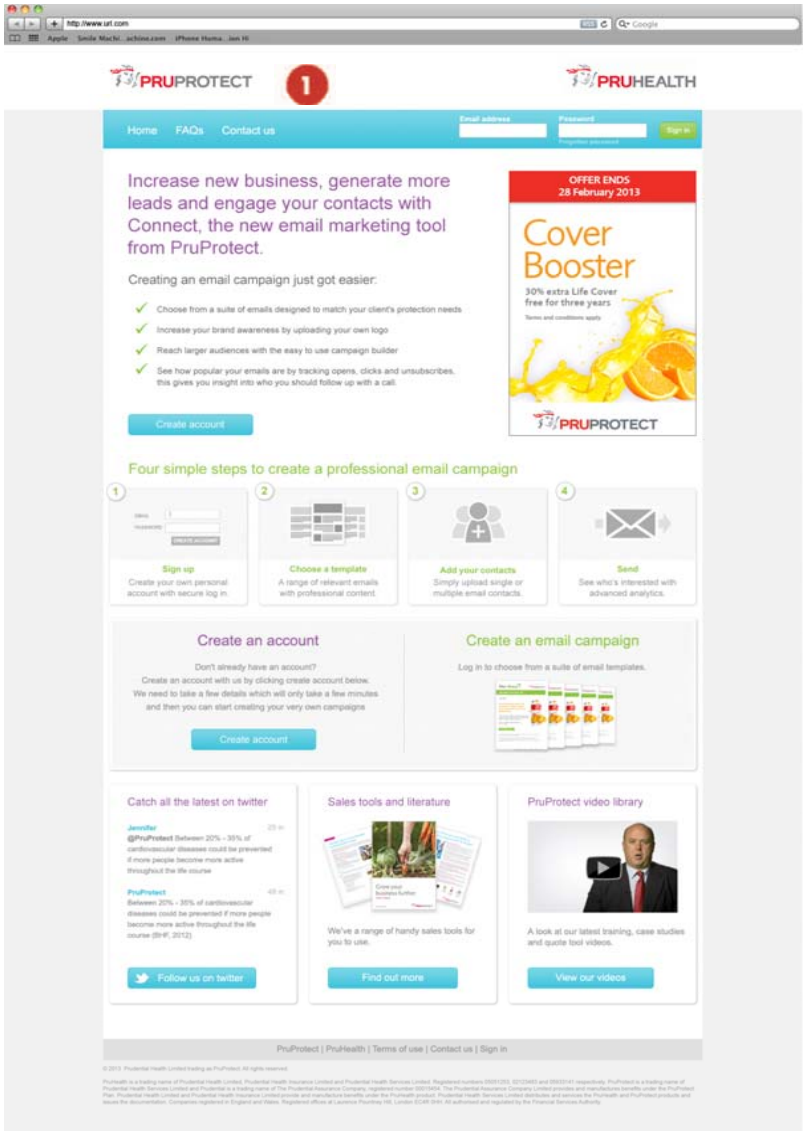


NB: If mobile version does not appear, you can add icon to home screen by clicking redirect button at the bottom of the screen and selecting add to home screen

Contact us and help

PRUPROTECT

Connect: Contact us and help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Create account
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PRUPROTECT
Four simple steps to create a professional email campaign
Sign up
Choose a template
Add your contacts
Send
Create an account
Create an email campaign
Create account
Catch all the latest on twitter
Follow us on twitter
Sales tools and literature
Find out more
PruProtect video library
View our videos
PruProtect | PruHealth | Terms of use | Contact us | Sign in

Contact us

Home page

1. Select the “Contact us” tab at the top where you will find our contact details for any questions or queries

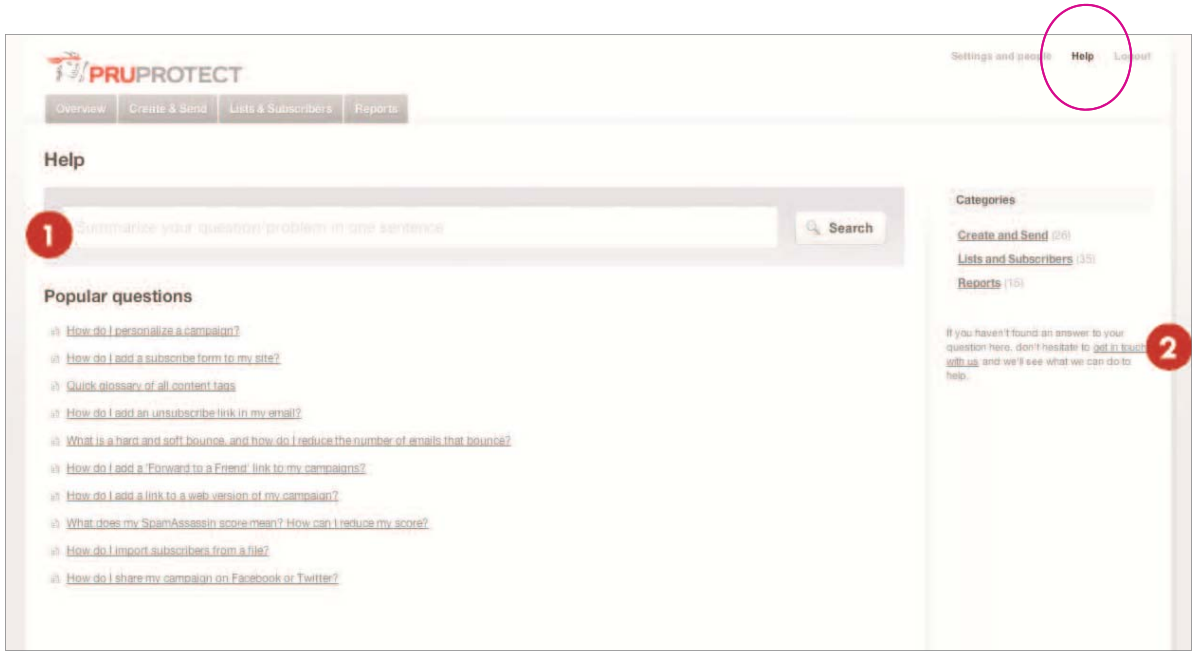
* Send us any feedback you have on our templates if you have any new topics you would like us to look at next

PRUPROTECT

Connect: Contact us and help

Help page (tab circled)

1. provides useful help with your campaigns (enter a query)
2. Get in touch – If there is something you cant find then you can get in touch with us


PRUPROTECT
Overview
Create & Send
Lists & Subscribers
Reports
Help
Help
Search
Popular questions
How do I personalize a campaign?
How do I add a subscribe form to my site?
Quick glossary of all content tags
How do I add an unsubscribe link in my email?
What is a hard and soft bounce, and how do I reduce the number of emails that bounce?
How do I add a 'Forward to a Friend' link to my campaigns?
How do I add a link to a web version of my campaign?
What does my SpamAssassin score mean? How can I reduce my score?
How do I import subscribers from a file?
How do I share my campaign on Facebook or Twitter?
Categories
Create and Send
Lists and Subscribers
Reports
1
2

PRUPROTECT

If you require anymore information speak to your local Business Consultant or contact us at connect@pruprotect.co.uk

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